

Autofill templates

For referring providers

Overview

An Autofill Template streamlines eForm completion for commonly requested services, eliminating repetitive data entry and saving time with a single click.

Steps/Procedure

Creating Autofill Templates for your Ocean account:

1. Log-in to Ocean Portal.
2. Click your name in the top right corner and select 'My Account.'



3. Set the 'Autofill Templates' setting to 'Enabled.'
4. Click 'Save Changes.'

Creating an Autofill Template

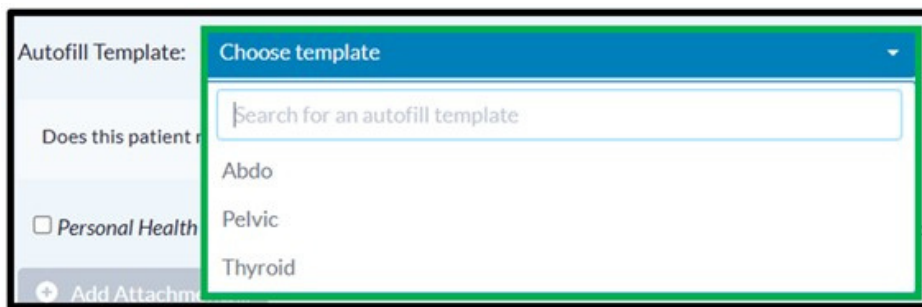
1. Navigate to the Ocean Healthmap.
2. Select the Directory Listing and eForm you want to use to create an Autofill template.
3. Click 'Send eReferral.'
4. Click 'Create new' in the Autofill bar.

5. In the 'Template Name' field, add a descriptive title.
6. In the 'Sharing' field:
 - a. All users can select 'Private' meaning only you can use this template.
 - b. Admin users can select 'Shared' meaning any user on your Ocean Site can use this template.

7. Complete the eForm to include all answers you would like saved in the template.
8. Click 'Create' in the bottom right corner.

Using an Autofill Template

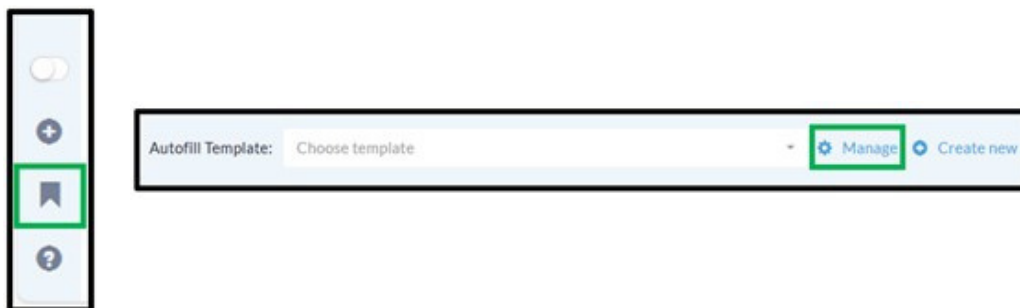
1. Initiate patient eForm from the Ocean Healthmap.
2. Select 'Choose template' from the dropdown menu and select the Autofill template requested.



3. The eForm will automatically populate with the saved answers. Complete required fields, including fields requiring patient specific information and click 'Send eReferral.'

Editing Autofill Templates

1. Navigate to the Ocean Healthmap.
2. Click the 'Manage Autofill Templates' button in the bottom left corner or click the 'Manage' button in the Autofill bar within the eForm.



3. On the 'Manage Autofill Templates' page, click 'Edit' next to the requested template.

Template name	Listing	eForm	Owner	Sharing			
Abdo	[entries:reference:c0-e835]	Diagnostic Imaging US eReferral Form [2025-02-03]	almccabe	Shared	Edit	Duplicate	Delete
Pelvic	[entries:reference:c0-e835]	Diagnostic Imaging US eReferral Form [2025-02-03]	almccabe	Shared	Edit	Duplicate	Delete
Thyroid	[entries:reference:c0-e835]	Diagnostic Imaging US eReferral Form [2025-02-03]	almccabe	Shared	Edit	Duplicate	Delete

4. The Autofill template will open, allowing users to edit:

- Template Name.
 - Shared access (if user has admin access).
 - Form answers saved within the template.
5. Once desired changes are complete, click 'Save' in the bottom right corner.

Quick Tips:

- Users with Site Admin access can 'Edit', 'Duplicate', and 'Delete' all templates in the Ocean site, including 'Private' templates created by other users.
- As a safety measure, when an Autofill template is used, a message will appear at the bottom of the window prompting a review to verify all form information is accurate.
- Ensure no personal health information is included in the Autofill template. Templates should only contain generic, reusable content.
- Autofill templates may become outdated if changes are made to the eForm. Users with Site Admin access can click 'Review Template' to update any Autofill template, users without Site Admin access can update their private templates or contact an Admin to update any Autofill templates.